

CONTRACT FOR SPECIAL SERVICES BY INDEPENDENT CONTRACTOR

THIS CONTRACT is entered into this day of , 2016, by and between the COUNTY OF SAN LUIS OBISPO (hereinafter referred to as "County") and Infosend, Inc., an independent contractor (hereinafter referred to as "Contractor").

W I T N E S S E T H

WHEREAS, the County of San Luis Obispo has need for special services and advice in printing and mailing tax bills and notices; and

WHEREAS, Contractor is specially trained, experienced, expert and competent to perform such special services;

NOW, THEREFORE, the parties mutually agree as follows:

1. **Scope of Services.** Pursuant to this Contract, Contractor shall provide to County the special services as described in Attachment A.
2. **Compensation.** County shall pay to Contractor as compensation in full for all services performed by Contractor pursuant to this Contract, the compensation as described in Contractor's response to the County's Request for Proposal #1348, included herein as Attachment B, within thirty (30) days after the receipt of an itemized statement from Contractor required by paragraph 3 herein, which has been previously approved by an appropriate representative of the County Department for whom contractor is directly working. Compensation for actual postage used in providing these services will be invoiced to the County for actual cost on a pass-through basis. Postage will be invoiced and handled separately from other invoices and will be paid by the County on an accelerated basis to the Contractor via ACH payment within 15 days of receipt of invoice.
3. **Billing.** Contractor shall submit to the County, on at least a monthly basis, a detailed statement of services performed during that preceding period, including the number of hours of work performed.
4. **Term of Contract.** This Contract shall commence on May 1, 2016, and shall terminate on April 30, 2021, unless terminated earlier as provided herein. Termination of the Contract may be effectuated by the Auditor-Controller-Treasurer-Tax Collector without the need for action, approval or ratification by the Board of Supervisors. Prices offered shall be firm for the first year of the contract period. The County and the Contractor reserve the right to negotiate the pricing for the remaining four (4) year period at the start of each year, so long as the agreed price is within the limits approved in the County of San Luis Obispo's Purchasing Policy."
5. **Termination of Contract for Convenience of Either Party.** Either party may terminate this Contract at any time by giving to the other party 90 days written notice of such termination.

Termination shall have no effect upon the rights and obligations of the parties arising out of any transaction occurring prior to the effective date of such termination. Contractor shall be paid for all work satisfactorily completed prior to the effective date of said termination.

6. Termination of Contract for Cause. If contractor fails to perform Contractor's duties to the satisfaction of the County or if Contractor fails to fulfill in a timely and professional manner Contractor's obligations under this contract or if Contractor shall violate any of the terms or provisions of this Contract or if Contractor, Contractor's agents or employees fail to exercise good behavior either during or outside of working hours that is of such a nature as to bring discredit upon the County, then County shall have the right to terminate this Contract effective immediately upon the County giving written notice thereof to the Contractor. Termination shall have no effect upon the rights and obligations of the parties arising out of any transaction occurring prior to the effective date of such termination. Contractor shall be paid for all work satisfactorily completed prior to the effective date of such termination. If County's termination of Contractor for cause is defective for any reason, including but not limited to County's reliance on erroneous facts concerning Contractor's performance, or any defect in notice thereof, County's maximum liability shall not exceed the amount payable to Contractor under paragraph 5 above.

7. Equal Employment Opportunity. During the performance of this contract, the Contractor agrees that it will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin, and hereby promises to comply with the provision on contractor agreements contained in Presidential Executive Order Number 11246 as amended by Executive Order 11375 and as supplemented in Department of Labor regulation (41 CFR Part 60).

8. Entire Agreement and Modification. This Contract supersedes all previous contracts and constitutes the entire understanding of the parties hereto. Contractor shall be entitled to no other benefits than those specified herein. No changes, amendments or alterations shall be effective unless in writing and signed by both parties. Contractor specifically acknowledges that in entering into and executing this Contract, Contractor relies solely upon the provisions contained in this Contract and no others.

9. Non-Assignment of Contract. Inasmuch as this Contract is intended to secure the specialized services of the Contractor, Contractor may not assign, transfer, delegate or sublet any interest therein without the prior written consent of County and any such assignment, transfer, delegation or sublease without the County's prior written consent shall be considered null and void.

10. Covenant. This Contract has been executed and delivered in the State of California and the validity, enforceability and interpretation of any of the clauses of this Contract shall be determined and governed by the laws of the State of California. All duties and obligations of the parties created hereunder are performable in San Luis Obispo County and such County shall be the venue for any

action or proceeding that may be brought or arise out of, in connection with or by reason of this Contract.

11. Enforceability. If any term, covenant, condition or provision of this agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remainder of the provisions hereof shall remain in full force and effect and shall in no way be affected, impaired or invalidated thereby.

12. Employment Status. Contractor shall, during the entire term of the Contract, be construed to be an independent Contractor and nothing in this Contract is intended nor shall be construed to create an employer-employee relationship, a joint venture relationship, or to allow County to exercise discretion or control over the professional manner in which Contractor performs the services which are the subject matter of this Contract; provided always, however, that the services to be provided by Contractor shall be provided in a manner consistent with all applicable standards and regulations governing such services.

Contractor understands and agrees that Contractor's personnel are not and will not be eligible for membership in or any benefits from any County group plan for hospital, surgical or medical insurance or for membership in any county retirement program or for paid vacation, paid sick leave or other leave, with or without pay or for any other benefit which accrues to a County employee.

13. Warranty of Contractor. Contractor warrants that Contractor and each of the personnel employed or otherwise retained by Contractor are properly certified and licensed under the laws and regulations of the State of California to provide the special services herein agreed to.

14. Indemnification. Notwithstanding anything contained in Attachment B, pages 20 and 21, the CONTRACTOR's response to Request for Proposal, to the fullest extent permitted by law, CONTRACTOR shall indemnify, defend, and hold harmless the County and its officers, agents, employees, and volunteers from and against all claims, demands, damages, liabilities, loss, costs, and expense (including attorney's fees and costs of litigation) of every nature arising out of or in connection with Contractor's performance or attempted performance of work hereunder or its failure to comply with any of its obligations contained in the agreement, except such loss or damage which was caused by sole negligence or willful misconduct of the County.

15. Insurance. Contractor shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, its agents, representatives, or employees.

MINIMUM SCOPE AND LIMIT OF INSURANCE

Coverage shall be at least as broad as:

1. **Commercial General Liability (CGL):** Insurance Services Office (ISO) Form CG 00 01 covering CGL on an "occurrence" basis for bodily injury and property damage, including products-completed operations, personal injury and advertising injury, with limits no less than **\$1,000,000** per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit.
2. **Automobile Liability:** ISO Form Number CA 0001 covering, Code 1 (any auto), or if Contractor has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than **\$1,000,000** per accident for bodily injury and property damage.
3. **Workers' Compensation** insurance as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than **\$1,000,000** per accident for bodily injury or disease. If the Contractor maintains higher limits than the minimums shown above, the County requires and shall be entitled to coverage for the higher limits maintained by the contractor.

UNIQUE INSURANCE

Professional Liability/Errors and Omissions

Insurance covering Contractor's liability arising from or related to this Contract, with limits of not less than \$1 million per claim and \$2 million aggregate. Further, Contractor understands and agrees it shall maintain such coverage for a period of not less than three (3) years following this Agreement's expiration, termination or cancellation.

OTHER INSURANCE Provisions

The insurance policies are to contain, or be endorsed to contain, the following provisions:

Additional Insured Status

The County, its officers, officials, employees, and volunteers are to be covered as insureds on the auto policy with respect to liability arising out of automobiles owned, leased, hired or borrowed by or on behalf of the Contractor; and on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Contractor including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Contractor's insurance (at least as broad as ISO Form CG 20 10, 11 85 or both CG 20 10 and CG 23 37 forms if later revisions used).

Primary Coverage

For any claims related to this contract, the **Contractor's insurance coverage shall be primary** insurance as respects the County, its officers, officials, employees, and volunteers. Any insurance or

self-insurance maintained by the County, its officers, officials, employees, or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

Notice of Cancellation

Each insurance policy required above shall state that **coverage shall not be canceled, except after thirty (30) days' prior written notice** (10 days for non-payment) has been given to the County.

Failure to Maintain Insurance

Contractor's failure to maintain or to provide acceptable evidence that it maintains the required insurance shall constitute a material breach of the Contract, upon which the County immediately may withhold payments due to Contractor, and/or suspend or terminate this Contract. The County, at its sole discretion, may obtain damages from Contractor resulting from said breach.

Waiver of Subrogation

Contractor hereby grants to County a waiver of any right to subrogation which any insurer of said Contractor may acquire against the County by virtue of the payment of any loss under such insurance. Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the County has received a waiver of subrogation endorsement from the insurer.

Deductibles and Self-Insured Retentions

Any deductibles or self-insured retentions must be declared to and approved by the County. The County may require the Contractor to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention.

Acceptability of Insurers

Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, unless otherwise acceptable to the County.

Claims Made Policies

If any of the required policies provide coverage on a claims-made basis:

1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.
2. Insurance must be maintained and evidence of insurance must be provided **for at least five (5) years after completion of the contract of work**
3. If coverage is canceled or non-renewed, and not **replaced with another claims-made policy form with a Retroactive Date** prior to the contract effective date, the Contractor must purchase "extended reporting" coverage for a minimum of **five (5) years** after completion of contract work.

Separation of Insureds

All liability policies shall provide cross-liability coverage as would be afforded by the standard ISO (Insurance Services Office, Inc.) separation of insureds provision with no insured versus insured exclusions or limitations.

Verification of Coverage

Contractor shall furnish the County with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by the County before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Contractor's obligation to provide them. The County reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.

Certificates and copies of any required endorsements shall be sent to:

San Luis Obispo County Tax Collector
Attention: Division Manager
1055 Monterey St. Room D-290
San Luis Obispo, CA 93408

Subcontractors

Contractor shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein.

Special Risks or Circumstances

County reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

16. Records.

a. Contractor shall keep complete and accurate records for the services performed pursuant to this Contract and any records required by law or government regulation and shall make such records available to County upon request.

b. Contractor shall assure the confidentiality of any records that are required by law to be so maintained.

c. Contractor shall prepare and forward such additional or supplementary records as County may reasonably request.

17. Accounting.

Contractor shall maintain accounting records in accordance with generally accepted accounting principles. The Contractor shall obtain the services of a qualified bookkeeper or accountant to ensure that accounting records meet this requirement.

Contractor shall maintain acceptable books of accounts which include, but are not limited to, a general ledger, cash receipts journal, cash disbursements journal, general journal and payroll journal.

Contractor shall record costs in a cost accounting system which clearly identifies the source of all costs. Contract costs shall not be co-mingled with other project costs, but shall be directly traceable to contract billings to the County.

The use of worksheets to produce billings shall be kept to a minimum. If worksheets are used to produce billings, all entries should be documented and clearly traceable to the Contractor's cost accounting records.

All accounting records and supporting documentation shall be retained for a minimum of five (5) years or until any audit findings are resolved, whichever is later. Contractor shall safeguard the accounting records and supporting documentation.

Contractor shall make accounting records and supporting documentation available on demand to the County for inspection and audit. Disallowed costs shall be repaid to the County. The County may require to have the Contractor's accounting records audited, at Contractor's expense, by an accountant licensed by the State of California. The audit shall be presented to the County Auditor-Controller within thirty (30) days after completion of the audit.

18. Notices. Any notice required to be given pursuant to the terms and provisions hereof shall be in writing and shall be sent by first class mail to the County at:

San Luis Obispo County Tax Collector
1055 Monterey St, Suite D-290
San Luis Obispo, CA 93408

and to the Contractor:

Infosend, Inc.
4240 E. LaPalma Ave
Anaheim, CA 92807

19. Cost Disclosure - Documents and Written Reports.

Pursuant to Government Code section 7550, if the total cost of this Contract is over \$5,000, the Contractor shall include in all final documents and in all written reports submitted a written summary of costs, which shall set forth the numbers and dollar amounts of all contracts and subcontracts relating to the preparation of such documentation or written report. The contract and subcontract numbers and dollar amounts shall be contained in a separate section of such document or written report.

20. Copyright.

Any reports, maps, documents or other materials produced in whole or part under this Contract shall be the property of the County and none shall be subject to an application for copyright by or on behalf of Contractor.

21. Findings Confidential.

No reports, maps, information, documents, or any other materials given to or prepared by Contractor under this Contract which County requests in writing to be kept confidential, shall be made available to any individual or organization by Contractor without the prior written approval of County. However, Contractor shall be free to disclose such data as is publicly available.

22. Equipment and Supplies.

Contractor will provide all necessary equipment and supplies in order to carry out the terms of this Contract.

IN WITNESS THEREOF, County and Contractor have executed this Contract on the day and year first herein above set forth.

CONTRACTOR

By: 

Title: COO

COUNTY OF SAN LUIS OBISPO

By: _____

Title: _____

COUNTY COUNSEL:

Approved as to form and legal effect.

Rita Neal
County Counsel

By: 

Deputy County Counsel

4/27/11

Date

ATTACHMENT A

Scope of Services

Contractor will provide full printing and mailing services integrated with USPS for mailing general notices, letters, and property tax statements which may include but not be limited to the jobs listed below:

Job #	Job Name	# batches per year	Total Approx. Mailing Pieces/year
1	Annual Current Secured Property Tax Bills	1	110,000
2	Revised Current Secured Property Tax Bills	12	12,000
3	Periodic Change of Ownership/Address Duplicate Property Tax Bills	5	7,000
4	Annual Unsecured Property Tax Bills	1	10,000
5	Monthly Supplemental Property Tax Bills	10	10,000
6	Semi-annual Tax Status Letters	2	12,000

Each of the above print and mailing jobs are described in more detail below. General requirements applying to all printing and mailing jobs:

The County will:

- Transmit electronically to the Contractor all Bills, Notices, and Letters to be printed in PDF format.
- Provide all pre-printed master envelopes and remittance envelopes as specified. Samples are included for reference. Remittance envelopes are to be inserted into master envelopes along with tax bills as specified in each print job.
- Provide print files such that the mailing addresses will be printed in an area to allow the address to be seen through the window on the master envelope.

The Contractor will:

- Work with the county programmers to receive, send, and verify appropriate files in a format acceptable to the county.
- Provide samples for final approval by County prior to processing full print jobs.
- Work with County to assure proper format.
- Print Bills, Notices, and Letters and some variable data, including adding and printing intelligent mail barcodes ("IMB").
- Supply and quote cost for each type of paper to be used in print jobs.
- Print in full color or black and white as specified. Contractor may quote costs for laser jet, inkjet or other printing methods.
- Print on one or both sides of paper as specified by the County in each print job.
- Fold, insert and seal the Bills, Notices, and Letters, remittance envelopes, and other inserts as required into master envelopes.
- Provide for up to six pieces to be inserted into each envelope.
 - Tax Bills or Letters.
 - Remittance envelopes (standard size #9). Insertion quantity may be zero, one, or two, as specified by a code printed on the tax bill.
 - Other inserts may be 8 1/2" x 3 2/3" or 8 1/2" x 11" or 8 1/2" x 14" as specified in each job.
 - Mailing addresses will be printed in an area to allow the address to be seen through the window on the envelope.

- Provide capability for different folds as required to insert and make mailing address visible through master envelope window.
- Where perforations are used, folds must be on perforations.
- Provide “house-holding” services
 - Identify multiple mail items going to the exact same name and address, and consolidate these into one master envelope or package to save postage and provide better service to taxpayers.
 - Both the name and the address must be an exact match to be house-held.
 - Use different sized master envelopes or packages, depending on the number of consolidated items. An approximate distribution of such items is included as Exhibits 4 and 6.
 - Contractor must include with quote how many tax bills can be stuffed into each type of master envelope (#10 window, 10” x 15” window, or larger package)
- Presort mailings in order to minimize postage cost. Specify how presort will be done and how it will minimize postage costs for the County.
- Deliver stuffed, folded, sealed, and presorted envelopes to the United States Post Office, utilizing Contractor’s mailing permit.
- Prepare all USPS paper work for mailing efficiency and provide copies to the County.
- Provide reports to County on mailings, bad addresses, and others reports as specified.
- Manage processing of all mailing files through NCOA and CASS, and provide reporting back to County. Replace abbreviated City names included in County-delivered electronic files with actual name so “Full Service” with USPS certification will be accurate.
 - If an item does not qualify for IMB as addressed, and no forwarding address is available, Contractor will mail to the bad address anyway (as required under California Revenue & Taxation Code).
 - If an item does not qualify for IMB as addressed, but there is a better address available through NCOA, Contractor will not mail the item, and instead will return a file to the County showing both the original and the forwarding address. Contractor will not bill the County for postage for such items.
 - For all items above, Contractor must provide a report including batch, page, reject type, and better address if available.
- Where possible, quote each cost item separately, with fixed and variable costs separated. Quote variable costs as per thousand pieces, so the County may better understand how changes in quantities will affect costs.
- Describe invoicing processes and level of itemization of invoices.
- Describe how postage costs will be handled, where mailing pieces do not qualify for use of the County’s presort/bulk permit.
- Describe how workflow processes and status of jobs will be communicated.
- Describe Customer Service support.
- Describe any performance guarantees, and adjustments to costs that would be made if a mailing deadline were missed, due entirely to Contractor’s failure to perform, and under what circumstances.

See specific requirements for each type of job on pages which follow.

Annual Current Secured Property Tax Bills

- These bills are printed and mailed once each year.
- Approximately 130,000 tax bills must be printed and mailed to approximately 110,000 unique addresses, together with inserts as specified.
- Please refer to samples. Each envelope or package will contain:
 - One or more Tax Bills, to be printed, folded, and stuffed into master envelopes by Contractor.
 - Sample shown as Exhibit 1
 - Either two, one, or no #9 remittance envelopes will be inserted into master envelopes, based on codes printed on the tax bill. As shown in Exhibit 1, the code "ENV2" in the lower right corner of the bill indicates 2 remittance envelopes are to be included. Similarly, "ENV1" indicates one remittance envelope, and "ENV0" indicates no remittance envelope.
 - One 8 ½" x 11" insert to be printed, folded and stuffed into master envelopes by Contractor.
 - Sample shown as Exhibit 2
 - Printed one or both sizes.
 - Option for full color or black and white.
 - Paper to be 24# white.
 - Approximate quantity 110,000
 - One 8 ½" x 3 2/3" insert, to be printed, folded and stuffed into master envelopes by Contractor.
 - Printing to be one color on one side on 24# white paper.
 - Sample shown as Exhibit 3.
- Print files with addresses will be provided by the County in approximately early to mid-September. Bills must be printed and mailed no later than September 30th. Contractor should specify turnaround time in business days, from time of receipt of print file to time of delivery to USPS. The shorter the turnaround time, the better.
- Tax Bills will be 8 ½" x 14".
 - The front side of each bill will be unique.
 - The back side of each bill will be fixed and common to all these bills.
 - Full color on both front and back.
 - Each bill must have two clean horizontal perforations to allow for clean and easy separation of two payment stubs from the rest of the bill. Location of perforations will be specified in advance by the County, and will be the same for all bills. One perforation will be between 3" and 3 ½" from the bottom of the bill. The second perforation will be from 6" to 7" from the bottom of the bill.
 - If possible, allow perforations to be zero, one, or two, depending on a printed code on the tax bill.
 - Quote cost for both 24# and 28# paper
- Add IMB to PDF form provided before printing for each unique name and address. Multiple items to exact same name and address may be coded only once.
- Print IMBs in address field.
- Envelopes provided by County to be:
 - #10 white window with County permit pre-printed. Quantity approximately 110,000.
 - #10 white window for non-presort. Quantity 5,000.
 - White 10" x 15" window.
 - #9 blue remittance envelopes. Quantity approximately 180,000.
- Contractor should have ability to store all envelopes for up to 2 months prior to September mailing. Quote any storage charges separately.

- Contractor to specify maximum number of tax bills going to the exact same name and address that can be folded, stuffed, and mailed in a single standard #10 envelope.
- Contractor to specify the maximum number of tax bills going to the exact same name and address can be mailed in a single 10" x 15" envelope.
- Contractor to specify process and costs, and how such costs will be billed, when the number of Tax Bills being mailed to the exact same name and address exceeds the maximum for 10" x 15" envelopes.
- Refer to Exhibit 4 for house-holding: approximate distribution of quantities by number of bills per exact name and address.
- For bills going in the #10 envelopes, folds must occur on each perforation on the Tax Bill.
- Tax Bills going in the 10x15 envelopes need not be folded.
- Contractor to describe their process for accomplishing the above.

Revised Secured Property Tax Bills

- These jobs will begin in October and run through May and may occur once or twice each month. Batch sizes range from 500 to 2,500.
- Tax Bills must be printed and mailed no later than ten days after receipt of the print file.
- All other requirements of Annual Current Secured Property Tax Bills as specified above apply.

Periodic Change of Ownership/Address Duplicate Property Tax Bills

- These jobs will begin in October and run through May and may occur approximately 5 times per year. Batch sizes range from 500 to 2,500.
- Tax Bills must be printed and mailed no later than ten days after receipt of the print file.
- All other requirements of Annual Current Secured Property Tax Bills as specified above apply.

Annual Unsecured Property Tax Bills

- These Tax Bills are printed and mailed once each year.
- Approximately 10,000 Tax Bills must be printed and mailed to approximately 9,500 unique addresses, together with inserts as specified.
- Please refer to samples. Each envelope or package will contain:
 - Tax Bills, Exhibit 5
 - One #9 green remittance envelope
 - Optional 8 ½" x 11" insert. Exhibit 2
 - Optional 8 ½" x 3 2/3" insert. Exhibit 3.
- Print files with addresses will be provided by the County in approximately early to mid-July. Bills must be printed and mailed no later than July 31st. Contractor should specify turnaround time in business days, from time of receipt of print file to time of delivery to USPS. The shorter the turnaround time, the better.
- Tax bills will be 8 ½" x 14".
 - The front side of each bill will be unique.
 - The back side of each bill will be fixed and common to all these bills.
 - Full color on both front and back.
 - Each bill must have one clean horizontal perforation to allow for clean and easy separation of the single payment stub from the rest of the bill. Location of perforation will be specified in advance by the County, and will be the same for all bills. The perforation will be between 3" and 3 ½" from the bottom of the bill.
 - Quote cost for both 24# and 28# paper

- Add IMB to PDF form provided before printing for each unique name and address. Multiple items to exact same name and address may be coded only once.
- Print IMBs in address field.
- Envelopes provided by County to be:
 - #10 white window with County permit pre-printed. Quantity approximately 10,000.
 - #10 white window for non-presort. Quantity 500.
 - White 10" x 15" window.
 - #9 green remittance envelopes. Quantity approximately 10,000.
- Contractor should have ability to store all envelopes for up to 2 months prior to mailing. Quote any storage charges separately.
- Contractor to specify maximum number of tax bills going to the exact same name and address that can be folded, stuffed, and mailed in a single standard #10 envelope.
- Contractor to specify the maximum number of tax bills going to the exact same name and address can be mailed in a single 10" x 15" envelope.
- Contractor to specify process and costs, and how such costs will be billed, when the number of tax bills being mailed to the exact same name and address exceeds the maximum for 10" x 15" envelopes.
- Refer to Exhibit 6 for house-holding: approximate distribution of quantities by number of bills per exact name and address.
- For bills going in the #10 envelopes, a fold should also occur on the perforation. Bills going in the 10x15 envelopes need not be folded.
- Contractor to describe their process for accomplishing the above.

Supplemental Property Tax Bills

- These Tax Bills are printed and mailed monthly.
- Monthly batch sizes range from 500 to 2,500. Normally 8 to 10 of 12 months will have batches, meaning two to four months may be skipped. No batches occur in July. Below is the recent history of batch size. Contractor may specify a minimum batch size for processing, but must accept all batches over 500 pieces. (County has the capability of printing and mailing smaller batches in-house, up to 500 bills at a time).

Supplemental Bills Printed by Month

	Bills Printed		
	FY 2013-14	FY 2014-15	FY 2015-16
July	-	-	
August	704	1,746	1,007
September	6	3	5
October	408	1,065	
November	172	708	733
December	341	608	
January	6	1,973	
February	1,294	33	
March	975	2,264	
April	1,098	699	
May	802	1,579	
June	1,383	784	
Full Year	7,189	11,462	

- Print files with addresses will be provided by the County each month in which batches are created.
- Bills must be printed and mailed no later than seven days after receipt of the file

- Contractor should specify turnaround time in business days, from time of receipt of print file to time of delivery to USPS. The shorter the turnaround time, the better.
- Please refer to samples. Each envelope or package will contain:
 - Tax Bills, as shown in Exhibit 7
 - One or two #9 Pink Remittance envelopes, based on a code at the bottom right corner of the printed Tax Bill, as previously described.
 - 8 ½" x 11" insert, similar to Exhibit 8
 - Optional 8 ½" x 3 2/3" insert, similar to Exhibit 3.
- Tax Bills will be 8 ½" x 14".
- The front side of each bill will be unique.
- The back side of each bill will be fixed and common to all these bills.
- Full color on both front and back.
- Each bill must have one or two clean horizontal perforations as specified by a code printed on the bill, to allow for clean and easy separation of one or two payment stubs from the rest of the bill. Location of perforations will be specified in advance by the County, and will be the same for all bills. One perforation will be between 3" and 3 ½" from the bottom of the bill. The second perforation will be from 6" to 7" from the bottom of the bill.
- Quote cost for both 24# and 28# paper
- Add IMB to PDF form provided before printing for each unique name and address. Multiple items to exact same name and address may be coded only once.
- Print IMBs in address field.
- Envelopes provided by County to be:
 - #10 white window with County permit pre-printed.
 - #10 white window for non-presort.
 - White 10" x 15" window envelopes.
 - #9 pink remittance envelopes.
- Contractor should have ability to store all envelopes for up to 2 months prior to mailing. Quote any storage charges separately.
- Contractor to specify maximum number of tax bills going to the exact same name and address that can be folded, stuffed, and mailed in a single standard #10 envelope.
- Contractor to specify the maximum number of tax bills going to the exact same name and address can be mailed in a single 10" x 15" envelope.
- Contractor to specify process and costs, and how such costs will be billed, when the number of tax bills being mailed to the exact same name and address exceeds the maximum for 10" x 15" envelopes.
- For bills going in the #10 envelopes, a fold should also occur on the perforation. Bills going in the 10x15 envelopes need not be folded.
- Contractor to describe their process for accomplishing the above

Tax Status Letters

- The County will transmit two files of Tax Status Letters each year.
- The first letter will be approximately 5,000 in quantity and will be transmitted in January.
- The second letter will be approximately 7,000 in quantity and will be transmitted in May.
- Paper to be white 24#.
- Letters will be provided in a single PDF file, ready to print.
- Letters must be printed and mailed no later than seven days after receipt of the file.
- These are to be printed as single page 8 ½ x 11 letters, full color, one side printed.
- Letters should be printed, folded, and stuffed into standard #10 white window envelopes, to be provided by County.

Blank Perforated Stock

- Contractor to provide blank unprinted white stock as follows:
 - 10,000 sheets of 8 ½" x 14" blank 28# paper stock (two perforations). Each sheet must have two clean horizontal perforations to allow for clean and easy separation of two stubs from the rest of the sheet. Location of perforations will be specified in advance by the County, and will be the same for all of these sheets. One perforation will be between 3" and 3 ½" from the bottom of the bill. The second perforation will be from 6" to 7" from the bottom of the bill.
 - 2,500 sheets of 8 ½" x 14" blank 28# paper stock (one perforation). Each sheet must have one clean horizontal perforation to allow for clean and easy separation of one stubs from the rest of the sheet. Location of perforation will be specified in advance by the County, and will be the same for all of these sheets. Perforation will be between 3" and 3 ½" from the bottom of the bill.
 - Quote cost per thousand additional sheets on each of the above.

ATTACHMENT B

Infosend Response to RFP#1348 including Fee Schedule